

Deal review sheet

One page per large deal. The rep fills it before the review; the manager scores section 5. Two flags or more means the deal is at risk and leaves Commit until they clear.

Account	Opportunity	Owner (AE)	SE	Amount	Close date	Category (Commit / Best case / Pipeline)	Stage	Days in stage

1. Why this deal, why now

Question	Answer
Business problem, in the buyer's words	
Compelling event and its date	
What happens to the buyer if they do nothing	

2. The buying group

Role	Name and title	Met by us?	Stance (champion / neutral / blocker)	Who on our side owns it
Economic buyer				
Champion				
Technical or security owner				
Procurement or legal				
Users				

3. The business case

Question	Answer
Value in numbers, as the champion will present it	
Can the champion forward a one-page case? (yes / no)	
Alternatives the buyer is weighing (competitor, build, do nothing)	
Why us, in one sentence the buyer would use	
Has our executive spoken to the buyer's boss? (yes / no / planned on date)	

4. Close plan (reverse-dated from signature)

Step (reverse-dated from signature)	Owner (buyer / us)	Date	Done
Technical or security sign-off			
Business case approved by economic buyer			
Commercial terms agreed			
Legal and procurement			
Signature			

5. Manager's inspection (two or more flags = at risk)

Question	Flag if	Flag? (yes / no)
What changed since the last review?	Nothing changed	
What did the buyer do in the last 14 days?	No reply or meeting from the buyer (30+ days quiet = watch, 60+ = stale)	
Who have we met?	Economic buyer not met, or only one contact engaged	
Did we follow our process?	Qualification fields blank or stage evidence missing	
What is the urgent initiative?	No compelling event with a date	
Are close date and amount stable?	Moved twice this quarter, or three pushes in total	

6. Decisions

Decision	Answer
Next step, dated and agreed by the buyer	
Executive or SE ask	
Category after review	
Review again on	